CULTURE, TOURISM & ENTERPRISE OVERVIEW AND SCRUTINY COMMITTEE	Agenda Item 8 Brighton & Hove City Council

Subject:		**The City's Approach to Tourism**		
Date of Meeting:		**1 July 2010**		
Report of:		**The Director of Housing, Culture & Enterprise**		
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Wards Affected:	All			

FOR GENERAL RELEASE

1. SUMMARY AND POLICY CONTEXT:

1.1 This report sets out the City's approach to tourism. It highlights the role that tourism plays, the challenges and opportunities faced and the strategy pursued.

2. RECOMMENDATIONS:

2.1 That members:

(1) Note the report and existing strategy set out in the appendix to this report.

(2) Give feedback on the report and strategic approach.

3. BACKGROUND INFORMATION

3.1 The City has been a tourist destination for 250 years and was one of the first destinations to develop in Europe.

3.2 The existing visitor profile is as follows (Source: 2009 On Street Visitor Survey and Cambridge Economic Impact Assessment 2008):

- 8,165,000 Visitors came to Brighton & Hove

- 1,387,000 stayed overnight in the City for an average of 3.18 nights
- Staying visitors accounted for £449m of expenditure
- Day visitors accounted for £244m of expenditure
- Total expenditure therefore was £693m.
- Staying visitors represent 17% of all visitors and 65% of all spend.
- 20% of all staying visitors are from overseas with Germany, the Netherlands and the USA being the largest source markets.
- This activity supports 12,933 FTE jobs in the City.
- 81% of all groups visiting the city contained no children and the average group size if 2.31 people.
- The majority of domestic visitors come from London and the South East (51%)
- 48% of visitors decided to visit the City within one week of their arrival.
- The 2009 survey found that against nearly all attributes visitors expectations of their visit were exceeded. Indicators scoring high included: 'Feeling of Welcome', 'East to get to', 'Good Shopping', 'Quality & Usefulness of Information', 'Choice of nightlife', 'Good eating & drinking'.
- Areas which scored lower than 7 out of 10 included: 'Ease of Parking', ' Value for money of parking', 'Availability of public toilets' and 'Cleanliness of public toilets'.
- However with an overall average score of 8.45 out of 10 and with over 8 out of 10 likely to recommend the City to others, there is much to commend current performance.

3.3 Visitor broadly fall into 3 main groups:

- Leisure visitors. Mainly couples, largely taking a short break and with very little notice and including domestic as well as overseas visitors.
- Students of English Language. A large source of international arrivals who study at one of the City's language schools.
- Business Visitors. Attendees at conferences and meetings within purpose built venues or hotels.

3.4 The Tourist Offer. The City has over 100 hotels and guest houses providing over 9000 bedspaces for every night of the year. There are hundreds more self-catering properties. The City has world renowned attractions from the Royal Pavilion to the Pier, The Sealife Centre to the Volks. It has entertainment venues including the Theatre Royal and The Dome and cultural events including over 56 festivals per year. We have new events including the Brighton Marathon as well as those that are well established such as the Burning of the Clocks. There are over 400 restaurants and the shopping offer is without equal in terms of the unique and independent Lanes and North Laine. The City also has a world class conference and meeting offer which includes the Brighton centre and also includes venues such as the Racecourse, The County Ground and our larger hotels such as the Hilton.

3.5 Comparator Data. It is unlikely that there is any City in the country that has a higher visitor to resident ratio. Over 32 visitors for every person living here. But there are also very few places where the volume of employment created by visitors exceeds that generated within Brighton & Hove. According to the International Passenger Survey 2009, Brighton & Hove is the 10th most visited UK destination ahead of Cardiff, Nottingham, Leeds, Newcastle, York and Bath but behind London, Edinburgh, Manchester, Birmingham, Glasgow, Liverpool, Bristol, Oxford, Cambridge.

3.6 In 2008 Cabinet approved a Tourism Strategy for the City for the period 2008 to 2018 and which superseded the Strategy for 2004-2014.

3.7 Strategically the main opportunity for any destination in receiving visitors is the creation of local employment and tourism in Brighton & Hove supports around 17,000 jobs almost 12,933 FTEs. The main challenge which destinations face in respect of this aim is achieving a balance to the tourism activity that reduces the seasonal impact of tourism; delivering the highest value tourism activity as that directly increases the volume of employment created; and doing so in a way which benefits the widest number of local people and local residents.

3.8 The 2008 Tourism Strategy has as it's vision the following:

In 2018, Brighton & Hove City will be a destination where the needs of **visitor,** the tourism **industry**, the **community** and the **environment** are in complete balance and consequently will make a significant contribution to improving the quality of life for local people. A well-planned and prosperous tourism industry is a catalyst for improving the environment if the city and the wellbeing of its people thus making it a better place in which to live and visit. The vision is for the City Council, partners and stakeholders to play a key role, working together to balance the interaction between Visitors, the Industry that serves them, the Community that hosts them and their collective impact on, and response to, the Environment where it all takes place:

The vision for the city is to be a sustainable destination where
***Visitors** are Welcome*
*The **Industry** is profitable*
*The **Community** benefits*
*The **Environment** is Enhanced*

3.9 The Strategy contains a SWOT which it is worth highlighting and adding to here:

Strengths:
- World Class architecture, culture and events
- A good domestic and international profile
- Ease of access to London and gateways
- Wide choice of quality accommodation
- Purpose built conference centre
- Strong sense of welcome and friendliness of local communities
- Easy to get around and condensed.
- Strength of Sussex hinterland including National Park
- Good public and private sector co-operation

Weaknesses:
- Achieving the right balance between the hedonism of night-time economy and desire to provide quality offer to all visitors.
- Lower than average occupancy levels and periods when accommodation supply significantly exceeds demand.
- Engineering work on rail network at weekends
- Visitor perceptions of cost and availability of parking

Opportunities
- Plenty of capacity at certain times of the year to grow business
- Use of Olympics to raise and improve skills and welcome
- New developments such as the Stadium can create new reasons to visit and generate additional business
- Creativity of local community and business community leads to new product development in retail, dining, accommodation, events etc.
- Climate change can increase demand for domestic holidays.

Threats
- Competitors increasing all the time with many new destinations emerging.
- Competitors outspending the City in terms of product development and marketing.
- Economic conditions restricting consumer spending.

3.10 The strategic response to this requires the City to develop in a way that it can compete effectively over the coming decades. It also requires the partnership of private, public and community to work together to promote and market the city and to ensure that the experience that visitors have when they come is of the highest quality.

3.11 In terms of the place, the strategy identifies three areas of focus:

3.11.1 The Guiding Principles (getting the basics right) includes investment in the infrastructure and physical environment, delivering responsible tourism, improving quality and raising standards and working in partnership.

3.11.2 The experiences include the many reasons why visitors come and return and give us opportunities for growth. They include a focus on our Natural and Built heritage; events & festival; Business Tourism; Health and Activity and the exposure of the City to audiences through Film and Television.

3.11.3 Finally the strategy recognises that visitors experience some but not all parts of the City and these areas have to be equivalent or better than competing spaces in other destinations. These spaces include the City's gateways' our seafront; The Downs and rural villages; our Parks and Open Spaces; Shopping Areas and some of the City's residential neighbourhoods.

3.12 By 2018 the City should be delivering £900m of economic impact into the City through tourism. With the delivery of the Brighton Centre redevelopment this could exceed £1bn.

3.13 The Tourism Service is a team of 17 FTEs who provide 4 main services within the City and the City Council:

3.13.1 Marketing. Funded jointly by the authority and local businesses the service delivers a comprehensive marketing plan which focuses on PR, online and other campaign to target domestic and international audiences. The focus on PR and online is intentional and delivers the best returns on investment. For example in 2009 the website www.visitbrighton.com generated 910,000 unique users and in 2010 is increasing by 32% on 2009; £3.5m of pr coverage was generated and included titles such as the New York Times, El Mundo and Die Welt as well as every major UK national. A copy of quotes from many of these papers are attached at Appendix 3.

3.13.2 Visitor Services. This team provides visitor information to almost 350,000 visitors through the city's main Visitor Information Centre as well as phone, e-mail and written responses to tens of thousands of other enquirers. They undertake significant amounts of data collection, manage our partnership with local businesses which currently has 325 partners paying to support the work of Visitbrighton and have been launching new schemes including a joint venture information point with the Toy & Model Museum. In 2009/10 the team handled 51,000 face to face enquiries, 12,000 e-mail, 1,000 postal and 12,000 phone enquiries; and sold £340,000 of tickets and accommodation. In 2007 it won the TIC of the Year award from Tourism South East and was a Silver winner at the national awards in 2008.

3.13.3 Convention Bureau. This team works with local venues and hotels to deliver Conferences to the City. Their work generates around £60m of economic impact every year. During 2009 the service handled 145 enquiries and confirmed 30 events. The delegate accommodation booking service also handled over £1m of bookings and generated over 13,500 bednights.

3.13.4 Destination Manager. This person is responsible for the practical implementation of projects arising from the Tourism Strategy. They work closely with City stakeholders, and across the Council to ensure that visitors needs are understood and acted upon in respect of policy decisions and wider activity. The manager is also responsible for the newly launched Greeter scheme and the City's Commemorative Plaque Scheme. There are currently around 100 plaques in the City and in the last few years plaques have been installed commemorating Anita Roddick, Peggy Ramsay, Admiral Codrington, The Brighton Insititute for the Deaf & Dumb and are shortly to install one for Henry & Arthur Wagner.

3.14 The Council's tourism service works in close partnership with national, regional and local organisations and businesses as follows:

3.14.1 International. The Council is a founding member of the International Congress and Convention Association and works with this organisation to generate new international conferences for the City.

3.14.2 National. The organisation has a close and practical working relationship with Visitbritain and VisitEngland and we recently hosted the National Tourism Awards in the City on St Georges Day. The City also works with national organisations on projects such as the development of new British and International Standards.

3.14.3 Regional. The tourism team work closely with Tourism South East and VisitSussex to raise the quality of the Tourism offer across the region.

3.14.4 Locally. We work closely with all tourism businesses. Over 325 are in paid partnership with Visitbrighton and we support many local organisations including the Brighton & Hove Hotels Association, The Attractions and Venues Forum; The English Language Organisations Liaison Group etc.

3.15 While visitors generate wealth for the City, it's businesses and residents the costs for ensuring that the city can continue to compete for and welcome visitors falls heavily to the public purse and impacts widely across the public sector from the Policing of the City to A&E at the Hospital; from the expenditure of the Highways Agency to Network Rail; and very obviously across the breadth of local authority spending. While it is recognised that the mix of the city's economy is and must broaden it remains clear that tourism will likely remain a key component of that economic mix. As a consequence investment has to be maintained in ensuring that the City provides what visitors want if we wish to see the employment that visitors generate sustained and grown.

4. CONSULTATION

4.1 Consultation was a comprehensive element of the development of the 2008 Tourism Strategy and remains a core part of the ongoing work of the Tourism team as identified through 3.14.

5. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

5.1 Delivery of the Tourism Strategy is expected to be achieved in partnership through a combination of identified resources within the Council's budget, income generation, attracting external funding and partners own resources.

Finance officer consulted: Anne Silley Date: 16 June 2010-06-17

Legal Implications:

5.2 There are no legal implications arising from this report.

Lawyer Consulted: Bob Bruce Date: 21 June 2010

Equalities Implications:

5.3 The service has considered its equalities impacts within existing Equality Impact Assessments. This report creates nor considers further implications. The City was however one of the first in the country to undertake a complete Destination Access Audit and is held up as an example of best practice.

Sustainability Implications:

5.4 Contained within the Tourism Strategy 2008.

Crime & Disorder Implications:

5.5 Contained within the Tourism Strategy 2008.

Risk and Opportunity Management Implications:

5.6 Contained within the Tourism Strategy 2008.

Corporate / Citywide Implications:

5.7 The main positive impact of the services work are the jobs created by the visitors. The most detrimental impact can be the way in which significant volumes of visitors impact negatively on residents whether that be in respect of waste generated or congestion.

SUPPORTING DOCUMENTATION

Appendices:

1. On Street Visitor Survey
2. 2008 Economic Impact Assessment
3. ‘What The Papers Say’

Documents in Members’ Rooms:

Background Documents:

1. Tourism Strategy 2008-2018

Appendix 1

Executive Summary

This survey of visitors to Brighton & Hove was commissioned by VisitBrighton and carried out by Tourism South East between July and September 2009.

- Day visitors accounted for 60% of all visitors, with a divide between day visitors from home (41%) and day visitors from holiday bases outside Brighton & Hove (19%). The remaining 40% of visitors were staying overnight in commercial or non-commercial accommodation within Brighton & Hove.

- The average size of all visitor groups surveyed was 2.31 people (1.97 adults and 0.34 children).

- Eighty per cent of groups to Brighton and Hove contained adults only.

- Overall, visitors were fairly evenly distributed between the age categories, but with the highest proportion of visitors falling into the 35-44, 45-54 and 55-64 age categories.

- 72% of visitors fell into the most affluent 'ABC1' socio-economic group.

- More than three quarters (83%) of all visitors were domestic visitors, with the remainder (17%) comprised of visitors from overseas.

- The highest proportion of day visitors from home came from homes in the South East (31%) and London (20%).

- The three main sources of origin of overseas visitors were: Germany, Netherlands and USA.

- The largest proportion of visitors described their visit to Brighton & Hove as a holiday or leisure based visit (73%). 15% of all visitors were visiting friends of relatives, 4% were visiting for a 'special' shopping trip, 2% on business and a further 3% were language students.

- Just under half of all visitors surveyed had not visited Brighton & Hove on a day trip within the last 12 months (41%), although a high proportion of day visitors from home were repeat visitors.

- Almost two-thirds of all visitors surveyed had not visited Brighton and Hove on staying trip within the last 3 months (61%), including a high proportion of day visitors from home (81%) and day visitors on holiday (72%).

- Around half of domestic visitors were on a short break of 2-3 nights, whereas the majority of overseas visitors were on a longer trip of over 14 nights.

- Just over half (52%) of staying visitors were found to be staying in serviced accommodation in Brighton and Hove (42% in hotels and 10% in B&B/Guest houses). A further 28% were staying in the homes of friends or relatives.

- Almost a fifth (19%) of all staying visitors had booked their accommodation 1 week before their trip, followed by 1 month (15%) and 2 months (13%).

- The majority (66%) of respondents had searched online to choose their accommodation prior to their arrival in Brighton and Hove.

- Over half (59%) of responding visitors staying in Brighton and Hove had used the internet to book their accommodation while a further 30% had booked directly.

- 39% of all staying visitors in 2009 were on a short break of 2-3 nights.

- The average number of overnight trips made each year by visitors staying in Brighton and Hove is 6.10.

- Almost half (48%) of all visitors made the decision to visit Brighton and Hove within a week of their visit.

- For almost a fifth of respondents, visiting to meet up with friends (10%) or family (9%) was the main motivation behind their visit to Brighton and Hove.

- The majority of day visitors spent over 5 hours in Brighton & Hove (77%).

- Forty two percent of visitors had travelled to Brighton & Hove by private car, while 36% of all visitors indicated that they had used the train to get to the city.

- Just under half (44%) of all visitors did not use any information source prior to their trip. However 26% received information from family members, friends and colleagues.

- The 6 most popular activities were ‘Just walking around’ (88%), ‘Going to a restaurant or place to eat out’ (78%), ‘Visiting the beach’ (72%), ‘Shopping’ (67%), ‘Visiting a tourist attraction’ (57%), and just ‘Relaxing/enjoying view/picnicking etc.’ (54%).

- The average spend per staying visitor per 24 hours (including spend on commercial accommodation) was around £125.56.

- Day visitors on holiday spent an average of £20.76 per person per day whilst day visitors from home spent an average of £26.14 per person per day.

- For visitors to Brighton & Hove, the key attributes which make for an excellent trip are that the destination is easy to get to, that it offers plenty to see and do, and that is offers high quality and affordable places to eat and drink.

- In general the 2009 survey found that on nearly all attributes visitors expectations were exceeded.

- The survey found high levels of satisfaction amongst visitors to Brighton & Hove on the various indicators which together comprise the 'visitor experience'. The highest scoring indicators related to feeling of welcome, Easy to get to, Rail, Good shopping, Quality of service at Visitor Information Centre, Usefulness of information at Visitor Information Centre, Choice of nightlife/evening entertainment and Good eating and drinking.

- The areas which received an average score lower than 7 were Ease of parking, Value for money of parking, Availability of public toilets, Cleanliness of public toilets.

- With an average score of 8.45, visitor's overall enjoyment of their trip to Brighton & Hove was relatively high. With just over 8 out of 10 people highly likely to recommend the city to friends and relatives and return themselves, the rate of referral and repeat visits was also relatively high.

Appendix 2

The Economic Impact of Tourism Brighton & Hove 2008

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TOURISM
SOUTH EAST

Key headline figures for Brighton & Hove

- 1,387,000 trips involved an overnight stay
- 4,414,000 nights were spent in the District by staying visitors
- £449,364,000 was spent by staying visitors on their trip
- 6,778,000 trip involved day trips
- £243,697,000 spent by day visitors on their trip
- In total £693,063,000 was spent by all visitors on their trip
- In addition, expenditure by friends and relatives on visitors, and visitors spend on boats and second homes generated a further £27,084,000
- With the addition of other expenditure and once adjustments are made, tourism activity generated £681,820,000 expenditure
- With the addition of multiplier impacts, tourism was worth around £938.7 million in 2008
- This income supported 12,933 FTE jobs and 17,584 Actual jobs
- ONS job figures show that an estimated 14,200 jobs in Brighton & Hove are in tourism-related sectors

Tourism Economic Impact Estimates

This report contains the findings of a study commissioned by Brighton & Hove City Council. Undertaken by Tourism South East the overall aim of the research is to provide indicative estimates for the volume, value and resultant economic impact of tourism on the destination. Expenditure data used in this report has been based on an average spend figure for 2008 drawn from the 2007 and 2009 Visitor Survey.

The research involved the application of the Cambridge Tourism Economic Impact Model or 'Cambridge Model'; a computer-based model developed by Geoff Broom Associates and the Regional Tourist Boards of England.

1. Summary of results

1.1 Volume and value of trips

- The most significant development affecting the industry in 2008 was the onset of global economic downturn. Turmoil in the financial sector across the USA and Europe ushered in a period of austerity in the UK following almost 16 years of unbroken gross domestic product (GDP) growth. The contraction of GDP in quarters 3 and 4 of 2008 was the first time the UK economy recorded negative growth in consecutive periods since 1991.

- Holidays and leisure travel in general suffered. In England, domestic tourism contracted by 4.7% in trip volume (from just over 100 million trips in 2007 to 95.5 million trips in 2008) and by 0.6% in trip expenditure compared to the previous year (from £16.5 billion in 2007 to £16.4 billion in 2008). VFR experienced the steepest decline (-8%) compared to 2007, whilst holiday trips fell by 4%.

- The impact on travel has been global. Results from the International Passenger Survey (IPS) reveal a reduction in the volume of inbound tourism visits into England in 2008 (-1.6% compared with 2007). Inbound tourism visits into England fell from 27.8 million in 2007 to 27.3 million in 2008. Trips from the USA dropped the most as Americans' lowest ever levels of consumer confidence and rising unemployment meant that far fewer took holidays abroad in 2008.

- The decline in trips at the national level is mirrored locally in Brighton & Hove. It is estimated that around 1,387,000 overnight tourism trips were made to Brighton & Hove in 2008. Of these trips, domestic visitors made 80% of trips (1,104,000) and overseas visitors made 20% of trips (283,000). Compared to 2007, the volume of domestic overnight trips dropped by 1.7%, and the volume of inbound overnight trips dropped by 2.7%.

- Of all commercial accommodation available to visitors, serviced accommodation (hotels, guest houses and B&Bs) was the most popular choice among visitors (used by 57% of domestic staying visitors and 42% of overseas staying visitors).

- Significant proportions of both domestic and overseas visitors were accommodated in the homes of friends and family during their trip to Brighton & Hove (37% and 34% respectively).

- Overall the number of nights spent in Brighton & Hove by domestic visitors mirrors the changes seen in the volume of trips – a decline of 1.6%.

- Inbound trips shortened in length so that the overall volume of nights spent in the Brighton & Hove by foreign tourists dropped by 4.3% compared to the 2.7% drop in trips.

- Despite the overall drop in volume of both trips and nights the average spend per head increased considerably in 2008 based on evidence drawn from local visitor surveys. Inbound trip expenditure increase is also a reflection of changes in currency. The weakness of the pound against other currencies explains part of the reason for the increase in expenditure by foreign visitors. It is also likely that many foreign visitors took advantage of the weak pound and spent more money on higher value items increasing average expenditure per head.

- In total, it is estimated that around £449,364,000 was spent by all overnight visitors on their trip to Brighton & Hove in 2008, up by 12% compared to 2007. Expenditure is up for domestic visitors by 11.9% and inbound trip spend is up by 13 %.

- It is estimated that around 6.7 million tourism day trips were made to Brighton & Hove in 2008, down by 1.6%. Despite the drop, day visitors spent more on their trip in 2008, raising overall expenditure to £243,697,000 up 1.7%.

- In total, around £693,063,000 was spent on trips to Brighton & Hove in 2008 by overnight and day visitors, up 8.3% compared to 2007. Thirty-nine percent of this expenditure was made by domestic staying visitors; 26% by overseas staying visitors and 35% by day visitors.

- *It is estimated that 22% of total trip expenditure went towards the cost of accommodation. Twenty-seven per cent of total trip expenditure was spent in catering establishments and a further 25.6% was spent in the retail sector. Approximately 11.4% of total trip expenditure went on visits to attractions and other entertainment. Finally, the remaining 13.8% of total trip expenditure was spent in the transport sector. This includes petrol and parking charges. A significant proportion of travel expenditure on fuel occurs outside the destination either at the start of the trip or on-route. Adjustments are made to account for this in the total turnover figures.*

- Further additional expenditure spent by visitors on second homes / boats and by friends and relatives, who visitors are staying with or visiting, needs also to be accounted for as this represents a significant additional source of income for local businesses. It is estimated that this ‘additional’ expenditure generated a further £27,084,000 of direct turnover for local businesses in 2008.

1.3 Economic impact

- Of the £693,663,000 estimated to have been spent by visitors on their trip and the £27 million additional trip-related expenditure, around £681,820,000 directly benefited local businesses from hotels and restaurants to cafes, shops and attractions in Brighton & Hove. Adjustments have been made to recognise that some spending on travel will take place outside the destination. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

- In addition to the business turnover generated in those businesses directly receiving visitor income, successive rounds of expenditure, that is spending by these businesses on local supplies and spending by employers in the local area, is estimated to have generated a further £256,919,000 to the local economy.

- Drawing together direct business turnover, supplier and income induced expenditure, and the additional expenditure spent on second homes and by friends and relatives, the total value of tourism activity in Brighton & Hove in 2008 is estimated to have been around £938,739,000.

- This income to the local economy is estimated to have supported around 12,933 Full-Time Equivalent Jobs and 17,584 Actual Jobs (with the addition of seasonal and part-time employment). These jobs are sustained in a wide number of service sectors including retail, catering, travel and hospitality and thus beyond tourism businesses.

- The Office of National Statistics employment figures drawn from the Annual Business Inquiry shows that an estimated 14,200 jobs in Brighton & Hove are in tourism and tourism-related businesses. According to the ABI data, tourism-related jobs represent 11.9% of all employee jobs in Brighton & Hove.

2. Tables of Results

2.1 Overnight trips by accommodation

Table 1: Number of staying trips by accommodation						
	UK	%	Overseas	%	Total	%
Serviced	632,000	57%	119,000	42%	751,000	54%
Self catering	12,000	1%	2,000	1%	14,000	1%
Caravan/tent	11,000	1%	1,000	0%	12,000	1%
	0	0%	0	0%	0	0%
Group/ campus	9,000	1%	14,000	5%	23,000	2%
Second homes	2,000	0%	2,000	1%	4,000	0%
Boat moorings	7,000	1%	0	0%	7,000	1%
Other	25,000	2%	3,000	1%	28,000	2%
Paying guests	0	0%	44,000	16%	44,000	3%
SFR	406,000	37%	97,000	34%	503,000	36%
Total 2008	1,104,000		283,000		1,387,000	
Total 2007	1,123,000		291,000		1,414,000	
% change	-1.7%		-2.7%		-1.9%	

Table 2: Number of nights by accommodation						
	UK	%	Overseas	%	Total	%
Serviced	1,454,000	55%	441,000	25%	1,895,000	43%
Self catering	39,000	1%	16,000	1%	55,000	1%
Caravan/tent	30,000	1%	3,000	0%	33,000	1%
	0	0%	0	0%	0	0%
Group/ campus	47,000	2%	85,000	5%	132,000	3%
Second homes	23,000	1%	18,000	1%	41,000	1%
Boat moorings	26,000	1%	0	0%	26,000	1%
Other	54,000	2%	3,000	0%	57,000	1%
Paying guests	0	0%	362,000	20%	362,000	8%
SFR	951,000	36%	862,000	48%	1,813,000	41%
Total 2008	2,624,000		1,790,000		4,414,000	
Total 2007	2,668,000		1,871,000		4,539,000	
% change	-1.6%		-4.3%		-2.8%	

Table 3: Spend by accommodation						
	UK	%	Overseas	%	Total	%
Serviced	£210,782,000	78%	£73,031,000	41%	£283,813,000	63%

Self catering	£2,581,000	1%	£1,044,000	1%	£3,625,000	1%
Caravan/tent	£1,666,000	1%	£200,000	0%	£1,866,000	0%
	£0	0%	£0	0%	£0	0%
Group/ campus	£2,430,000	1%	£6,650,000	4%	£9,080,000	2%
Second homes	£1,309,000	0%	£1,558,000	1%	£2,867,000	1%
Boat moorings	£1,268,000	0%	£0	0%	£1,268,000	0%
Other	£1,911,000	1%	£296,000	0%	£2,207,000	0%
Paying guests	£0	0%	£28,801,000	16%	£28,801,000	6%
SFR	£48,733,000	18%	£67,102,000	38%	£115,835,000	26%
Total 2008	£270,681,000		£178,683,000		£449,364,000	
Total 2007	£241,825,000		£158,161,000		£399,986,000	
% change	11.9%		13.0%		12.3%	

SFR = staying with friends/relatives

2.2 Tourism day trips

Table 4: Tourism day trips and spend			
	Trips		Spend
Total 2008	6,778,000		£243,697,000
Total 2007	6,888,000		£239,709,000
% change	-1.6%		1.7%

2.3 Sector breakdown of visitor expenditure

Table 5: Sector breakdown of trip expenditure								
	UK tourists		Overseas tourists		Day visitors		Total	
Accommodation	£96,348,000	35.6%	£55,790,000	31.2%	£0	0.0%	£152,138,000	22.0%
Shopping	£35,547,000	13.1%	£49,745,000	27.8%	£92,463,000	37.9%	£177,755,000	25.6%
Food and drink	£58,979,000	21.8%	£35,095,000	19.6%	£94,561,000	38.8%	£188,635,000	27.2%
Attractions/entertainment	£29,018,000	10.7%	£22,572,000	12.6%	£27,135,000	11.1%	£78,725,000	11.4%
Travel	£50,790,000	18.8%	£15,482,000	8.7%	£29,538,000	12.1%	£95,810,000	13.8%
Total	£270,682,000		£178,684,000		£243,697,000		£693,063,000	

2.4 Other trip related expenditure

Table 6: Breakdown of other trip related expenditure	
Second homes	£677,000
Boats	£2,598,000
Friends and relatives	£23,809,000

Total 2008	£27,1084,000

2.5 Business turnover derived from tourism and related expenditure

Table 7: Businesses in receipt of visitor spend on trip – distribution of turnover by sector						
	Staying tourists		Day visitors		Total	
Accommodation	£154,019,000	36.4%	£1,891,000	0.8%	£155,910,000	23.8%
Retail	£84,438,000	20.0%	£91,538,000	39.5%	£175,976,000	26.9%
Catering	£91,251,000	21.6%	£91,724,000	39.6%	£182,975,000	27.9%
Attraction/entertainment	£53,384,000	12.6%	£29,005,000	12.5%	£82,389,000	12.6%
Transport	£39,763,000	9.4%	£17,723,000	7.6%	£57,486,000	8.8%
Total 2008	£422,855,000		£231,881,000		£654,736,000	
Other trip related expenditure	£27,084,000		£0		£27,084,000	
Total direct 2008	£449,939,000		£231,881,000		£681,820,000	
Total direct 2007	£403,561,000		£228,195,000		£631,756,000	
% change	11.5%		1.6%		7.9%	

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. A small proportion of day trip spend will also fall into 'Accommodation' where day visitors have eaten in restaurants/bars of hotels. Furthermore, it is assumed that 40% of travel expenditure occurs outside the destination.

Table 8: Income for local business generated by trip expenditure	
Direct	£681,820,000
Supplier and income induced	£256,919,000
Total 2008	£938,739,000
Total 2007	£868,120,000
% change	8.1%

2.6 Employment supported by tourism and related expenditure

Table 9: Local employment supported			
	2008	2007	% change
FTE Jobs	12,933	11,943	8.3%
Actual Jobs	17,584	16,233	8.3%

Table 10: Proportion of tourism-related jobs				
	Brighton & Hove	Brighton & Hove	South East	Great Britain

	(employee jobs)	(%)	(%)	(%)
Tourism-related	14,200	11.9	8.2	8.2

Source: ONS annual business inquiry employee analysis

Notes: Tourism consists of industries that are also part of the services industry see definition below
% is a proportion of total employee jobs
Employee jobs excludes self-employed, government-supported trainees and HM Force

Tourism-related includes the following sectors:
SIC 551 Hotels
SIC 552 Camping sites etc
SIC 553 Restaurants
SIC 554 Bars
SIC 633 Activities of travel agencies etc
SIC 925 Library, archives, museums etc
SIC 926 Sporting activities
SIC 927 Other recreational activities

3. Methodology

The Cambridge Model

The Cambridge Model is essentially a computer-based spreadsheet model that produces estimates from existing national and local information (e.g. accommodation stocks, inbound trips) of the level of tourism activity within a given local area. The volume of visits are translated into economic terms by estimating the amount of spending by visitors based on their average spend per trip. In turn, the impact of that spending can be translated to estimate the effects in terms of business turnover and jobs.

The standard measures generated in this Model are: the total amount spent by visitors, the amount of income for local residents and businesses created by this spending, and the number of jobs supported by visitor spending.

As the Model utilises a standard methodology capable of application throughout the UK, it offers the potential for direct comparisons with similar destinations throughout the country.

The basic process of estimation used can be divided into three parts:

- visitor trips and visitor spending at a regional/county level derived from national survey sources (county/City)
- local supply data on accommodation, attractions and other factors specific to the City.
- the use of multipliers derived from business surveys in England to estimate full time equivalent and actual jobs generated by visitor spending in the area.

In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- United Kingdom Tourism Survey (UKTS)
- International Passenger Survey (IPS)
- England Leisure Visits Survey (ELVS)
- Visits to Attractions Survey
- New Earnings Survey
- Census of Employment
- Census of Population
- Labour Force Survey

The sophistication of the economic impact estimates will depend on the availability of detailed reliable local information to supplement national and regional data sources. Where such data is available from local surveys, then local variations can be explicitly included.

Appendix 3

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What the papers say…

- "It's the country's capital of acceptance… the quirky coastline undoubtedly brings out the holiday spirit in everyone."
  Scarlet Magazine, January '09

- "Brighton is one of the 'coolest' cities in the UK… It competes side by side with England's capital… guided by the liberal and tolerant aura that emanates from Brighton."
  El Mundo – Spain, January '09

- "Today's Brighton is a melting pot of nostalgia and invention."
  Lonely Planet, April '09

- "A diverse city with a cool and vibrant culture, plus loads of seaside tradition."
  Timesonline, May '09

- "Brighton means many different things to different people. As I've often said before, Brighton really does have it all."
  Excursions, June '09

- "A fine city, a fine beach and a fine day"
  Fodor's, June '09

- "Quirky shops, great nightlife and a walk on the beach make Brighton the ideal summer getaway…"
  Red Magazine, July '09

- "Brighton is a fully-fledged city that just happens to end at the beach… The Lanes… is Brighton at its most bijoux, a casbah of tight corridors lined with dolly-size jewellers…"

Good Housekeeping, August '09

- "Brighton – a city full of surprises"
  Schleslwig-Hostein am Sonntag – Germany, October '09

- The perfect escape from the frenzy of London combines traditional English holiday-making with an alternative vibe"
  TNT Magazine, October '09